

**OFFICE OF THE BOARD OF EDUCATION**

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**OAKLAND UNIFIED  
SCHOOL DISTRICT**

*Community Schools, Thriving Students*

**BOARD OF EDUCATION 2019**

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June 5, 2019


To: Board of Education

From: Aimee Eng

Sub: Appointment – Tina Longfield – Measures A, B and J Independent Citizens’ School  
Facilities Bond Oversight Committee

File ID Number: 19-1275  
Introduction Date: 6/5/19  
Enactment Number: 19-0911  
Enactment Date: 6/5/19 lf

  
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Aimee Eng, President  
Board of Education

  
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Kyla Johnson-Trammell, Secretary  
Board of Education

**ACTION REQUESTED**

Ratification by the Board of Education of President of Board’s appointment of Tina Longfield, as the statutory mandated Taxpayer Organization member, on the Measures A, B and J Independent Citizens’ School Facilities Bond Oversight Committee (Measures ABJ Committee), effective June 6, 2019, for unexpired term ending January 31, 2020.

**BACKGROUND/DISCUSSION**

The duties of the Measures A,B,J Committee, as defined by Board Bylaw 9131, is to provide advice and recommendation to the District regarding the expenditure of funds for bond related projects, to actively review and report on the proper expenditure of taxpayers’ money for school construction and to take any necessary action in furtherance of its purpose including, but not limited to, receiving and reviewing copies of annual independent financial audits and deferred maintenance proposals, inspecting school facilities and grounds, receiving and reviewing cost-saving measures designed to reduce the costs of professional fees and site preparation. The Committee also shall have the option to tour sites where Bond funds are being expended, with support from the Superintendent

There currently exists two vacancies on the Measures ABJ Committee.

I, pursuant to Board Bylaw 9131, hereby nominate Tina Longfield, as a member of Measures ABJ Committee, and recommend ratification of her appointment.

AE:ER:lf

Application: Tina Longfield (Redacted In Part)

### Profile

Tina Longfield  
First Name Last Name

tina.longfield@yahoo.com  
Email Address

### Which Boards would you like to apply for?

Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee: Submitted

[Redacted] Suite or Apt

Oakland CA 94611  
City State Postal Code

### Which Board of Education election district (1, 2, 3, 4, 5, 6, or 7) do you live in? \*

District 4

Mobile: [Redacted] Home:  
Primary Phone Alternate Phone

SunTrust Managing Director Finance  
Employer Job Title Occupation

1 Montgomery  
Employer's Street Address

San Francisco  
Employer's City

CA  
Employer's State

94611  
Employer's Zip

415-713-5541  
Work Phone

Work Email

### Interests & Experiences

**Please explain briefly your interest in serving on this Committee or Commission:**

I went to public school from kindergarten through University. I would love to have ideal public schools that work for our Oakland's students. I realize "ideal" is highly context specific depending on what the community needs and expects. Ultimately to get there, the funding needs to be there to achieve set goals, and the taxpayers do not want their money spent on projects or activities they did not vote for, and neither do they want money to be wasted. I believe my financial background, my inherent interest in the continued improvement of OUSD, and my role in a Taxpayer Association provide me with a balanced approach for the oversight committee.

**Please indicate your other community involvement (work with public agencies, volunteering, other committees, Commissions, groups, etc.):**

I served as an officer, Treasurer and Secretary of the Alameda County Taxpayers Association last year. Last year, I also worked for Loren Taylor's campaign, leading his field operations.

  
Upload a Resume

Question applies to multiple boards

**Educational Background – e.g. college and/or university, degree/major, vocational and/or training, certificates, technical training, etc.**

I graduated University of Illinois (a top accounting college in the nation) with an Accountancy and Finance degree, and University of Chicago Booth School of Business with MBA.

Question applies to Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee

**Please select each category that describes your community involvement**

- I am active in a bona fide taxpayer's organization
- I am the parent or guardian of a child enrolled in the District
- I am a parent or guardian of a child enrolled in the District and active in a parent-teacher organization, such as the Parent Teacher Association or school site council

Question applies to Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee

**Please list below the contact information, including the name, address, telephone number and a primary contact for the organization(s) that you are affiliated with, which are within the above stated categories.**

Alameda County Taxpayers Association, 186 Airway Blvd, Livermore, CA 94551 Primary Contact:  
President, Marcus Crawley, 510-531-4548

Question applies to Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee

**No employee or official of the District shall be appointed to the Commission or Committee. No person who is a, or employed by a, vendor, contractor or consultant of the District shall be appointed to the Commission or Committee. Any such affiliation shall disqualify an individual from Commission or Committee membership. Such affiliations must be disclosed below.**

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I have no such affiliations.

Question applies to Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee

**Are you affiliated with a vendor, contractor or consultant to the District?**

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Yes  No

Question applies to Measures A, B, and J Independent Citizens' School Facilities Bond Oversight Committee

If Yes, please explain.

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## Demographics

Choosing not to answer any of the questions in this section will not disqualify you from consideration or serving.

### Ethnicity

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Prefer not to Answer

### Gender

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Prefer to self-describe

### Socio-Economic Group

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None Selected

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## Verification

Please indicate your agreement with the following statement

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**I have reviewed and understand the duties of the Commission or Committee for which I am submitting this application. I agree to perform said duties. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.**

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I Agree

Your application must be **completed and submitted on-line via this web form**. For assistance, if needed, or response to questions, please contact Edgar Rakestraw, Jr., Executive Assistant, Board of Education, Oakland Unified School District, 1000 Broadway, Suite 680, Oakland, CA 94607-4009 or 510/879-8658 or via email at [Edgar.Rakestraw@ousd.org](mailto:Edgar.Rakestraw@ousd.org). Your application must be **submitted** by the applicable deadline, if any.

**Note: This application and your responses are a Public record and subject to disclosure.**

## TINA M. LONGFIELD

tina.longfield@yahoo.com

### EXPERIENCE

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#### **Sovran LLC – Bay Area, CA**

2017 to Present

*Managing Partner – Advisory Services*

- Provide high impact financial and strategic advice to start-up and mid-size companies. Deals include \$15+ million private debt for international technology company in transition; sale of VC-backed SaaS company to a strategic buyer; and strategic advisory assignment for internet company.

#### **RBC Capital Markets – San Francisco, CA**

2015 to 2017

*Managing Director – Investment Banking, Co-Head of Software & Services*

- Responsible for coverage across infrastructure and enterprise application software sector, increasing presence on the west coast, and expanding the firm's relationships with private equity and venture capital firms.
- Execution of public equity offerings, leverage finance and private placement for software companies.

#### **Jefferies & Co – Foster City, CA**

2008 to 2015

*Managing Director – Investment Banking, Global Head of Technology Services*

- Globally led Jefferies' Technology Services franchise and capabilities and expanding Jefferies' client base and winning mandates across all product lines globally, including public equity, convertible, leverage loan and high yield financing, and M&A.
- Manage a group of 5 professionals globally that support the Technology Services coverage effort.
- Since joining Jefferies, I was awarded and/or led the execution of approximately \$12 billion of transactions across all product lines.
- Jefferies' "Banker of the Year", 2012; Awarded/executed Jefferies' first Technology left lead equity offering; the first \$1 billion+ M&A transaction; and the largest left lead high yield offering at time of execution (\$770 million).

#### **Credit Suisse– Palo Alto and San Francisco, CA**

2000 to 2007

*Director – Investment Banking, Technology Services Group*

- Coverage responsibilities included large cap companies, and companies within the Technology Services and Financial Technology sectors. Completed approximately \$20+ billion of transactions.

#### **Thomas Weisel Partners – San Francisco, CA**

1999 to 2000

*Associate – Investment Banking*

- Completed approximately \$400 MM in IPO's and follow-on equity offerings in the Internet professional services, hospitality and e-commerce sectors for companies such as Cysive, Lante, Proxicom, Hotel Reservations Network and NextCard.

#### **Heitman Capital Management / JMB Institutional - Chicago, IL**

1994-1997

*Vice President – Acquisitions and Special Projects*

- Lead execution on the acquisition of \$180 MM portfolio of distressed loans, largest deal of 1995.
- Evaluated and executed real estate transactions for institutional and corporate investors. Negotiated and closed acquisitions of \$150 MM in industrial centers, \$60 MM in multi-family properties, and a \$120 MM regional mall.

### EDUCATION

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#### **University Of Chicago, Graduate School Of Business - Chicago, IL**

1997-1999

*Master of Business Administration – Finance and Analytical Finance*

#### **University Of Illinois - Champaign-Urbana, IL**

1989-1993

*Bachelors of Science – Accountancy and Real Estate Finance*

## TINA M. LONGFIELD

### Representative Transaction List

- Bookrunner for Coupa's \$150 million IPO and subsequent follow-on, 2016 and 2017
- \$1 billion senior notes financing for Francisco Partner's acquisition of Dell Software, 2016
- \$50 million private placement for Spredfast, 2016
- Bookrunner for Aptio's \$110 million IPO, 2016
- Co-Manager on CA Technologies' \$1bn Investment Grade Debt Offering, 2017
- \$400 million sale of a Oasis, 2015
- \$150 million sale of a Infogain, an IT Services Company, 2015
- \$120 million sale of a Grupo Assa, Latam-based IT Services Company, 2015
- \$250 million IPO for TriNet, a General Atlantic portfolio company, 2014
- \$150 million sale of Northgate Managed Services to Capita, 2013
- Sole advisor to PureCommerce, a leading FX payments solutions provider, to Euronet, 2013
- \$750 million financing for CompuCom, 2013
- \$1.1 billion sole advisor to TH Lee for their acquisition of CompuCom, 2013
- Bookrunner for Advent Software's \$150 million follow-on offering, 2013
- \$140 million convertible financing for iGate raised from Apax Partners, 2011
- Bookrunner for iGate's \$770 million bond financing, 2011
- \$1.2 billion sole advisor to iGate for their acquisition of Patni Computer Solutions, 2011
- \$350 million advisor to Ness Technologies' special committee, 2010
- Bookrunner for Syntel's \$150 million follow-on offering, 2010
- Sole bookrunner for iGate's \$35 million re-IPO, 2010
- Sale of iATS, a payment processing subsidiary of Ticketmaster, to First American Payments Systems, 2010
- Sale of Custom House to Western Union, 2009
- \$150 million sale of 7-Eleven's ATM business to Cardtronics
- Bookrunner for Syntel's \$100 million follow-on offering, 2007
- \$215 million financing for Thoma Cressey for their acquisition of Sirius Computer Solutions, 2006
- \$540 million sale of Ria, a money transfer services company, to Euronet Worldwide, 20x EBITDA, 2006
- \$365 million sale of Bankruptcy Management Solutions, a provider of software solutions and services to bankruptcy trustees, 2006
- \$220 million financing for Charlesbank in their acquisition of Bankruptcy Management Solutions. 2006
- \$200 million dividend recap for Datatel, a software provider to the higher education sector, 2006
- \$140 million follow-on offering for Gartner, a information services provider for the technology sector, 2006
- \$300 million dividend recap on Vertafore, a software provider to the insurance brokers, 2006
- Sale of Prophet21, a provider of distribution software for wholesale distributors, 2005
- \$230 million IPO and \$275 million follow-on for Verifone, 2005
- \$125 million financing for Thoma Cressey for their acquisition of Datatel, 2005
- \$11 BN sale of Sungard Data Systems to consortium of private equity investors, 2005
- \$180 million sale of Corio, an application service provider, to IBM, 2005
- \$180 million sale of Inflow, a managed services provider, to Sungard Data Systems, 2005
- \$5.0 BN credit line facility available for Oracle to acquire PeopleSoft, 2004
- \$1.9 BN Accenture's IPO in 2001; \$2.0 BN follow-on equity offerings in 2002 and 2003; and \$60 MM sale of Accenture Technology Venture's investment portfolio comprising of 42 individual investments in 2002.
- \$190 million sale of Applied Systems, a provider of document solutions used by legal firms in discovery processes, to Lexis Nexis/Reed Elsevier, 2003